DOCUMENT RESUME

ED 424 450 CE 077 450

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TITLE Action Learning for Individual and Organizational Development. Practice Application Brief.
INSTITUTION ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, OH.
SPONS AGENCY Office of Educational Research and Improvement (ED), Washington, DC.
REPORT NO RR93002001
PUB DATE 1998-00-00
NOTE 4p.
PUB TYPE ERIC Publications (071)
EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Adult Education; Adult Learning; Classroom Techniques; *Education Work Relationship; Educational Benefits; Educational Needs; Educational Practices; Educational Theories; *Experiential Learning; *Individual Development; *Organizational Development; *Theory Practice Relationship

ABSTRACT

This brief describes action learning (AL), discusses some of its advantages and challenges, highlights its educational applications, and recommends practices for future implementation. Action learning may be characterized as voluntary learning that is centered around the need to find solutions to real problems, that is equally concerned with individual development and finding solutions to problems, and that is a highly visible and time-consuming social process possibly leading to organizational change. Action learning has five elements: the problem, set, client, set advisor, and process. Action learning enables set participants to solve longstanding problems that could not be solved by simple training while simultaneously developing their leadership abilities. Challenges to the action learning methodology include concerns about the methodology itself and its misinterpretation and questions about its effectiveness. Action learning has many applications in adult education and human resource development. It may be used whenever learners have salient, nontechnical problems to solve and the capacity to work in small groups. Adult educators wishing to use action learning should take the following steps: prepare set participants for the action learning process with a start-up workshop; have set participants complete learning style questionnaires before the workshop; ensure that advisors have appropriate preparatory training; and document participants' personal development and encourage reflection throughout the action learning process. (Contains 20 references.) (MN)

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Action Learning for Individual and Organizational Development Practice Application Brief

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1998

PRACTICE APPLICATION BRIEF

Action Learning for Individual and Organizational Development

In an ever changing world, societal trends such as the empowerment of workers, the emphasis on product quality, and the increasingly technically complex work environment require continuous learning within organizations (Dilworth 1998a,b). Action learning may be viewed as the engine that converts changes in the external environment to the necessary internal organizational and individual changes (Mumford 1991). This ***Practice Application Brief*** describes action learning (AL), discusses some of its advantages and challenges, highlights its educational applications, and recommends practices for future implementation.

What Is Action Learning?

Reg Revans (1997), architect of action learning, believed that it is difficult to describe because it is so simple. McGill and Beaty (1995) defined it as "a continuous process of learning and reflection, supported by colleagues, with the intention of getting things done" (p. 21). Similarly, Inglis (1994) defined AL as "a process which brings people together to find solutions to problems and, in doing so, develops both the individuals and the organization" (p. 3).

In order to understand what AL is, it is necessary to know what it is not. Perhaps in part because of the similarity of the names, action learning is often confused with "learning by doing" (Wallace 1990). Revans himself contributed to this confusion by loosely defining AL's essence as learning from and with peers while tackling real problems (O'Neil and Marsick 1994). However, Revans (1980) also indicated that action learning was not synonymous with project work, job rotation, or any form of a simulation such as case studies or business games. In what ways does AL differ from these other methodologies (Inglis 1994)?

- Learning is centered around the need to find a solution to a real problem.
- Learning is voluntary and learner driven.
- Individual development is as important as finding the solution to the problem.
- Action learning is a highly visible, social process, which may lead to organizational change.
- Action learning takes time. As originally envisioned, an action learning program would take 4-9 months, excluding implementation.

Five basic elements of action learning are the **problem, set, client, set advisor,** and **process**.

The Problem(s) must be salient to the AL participants. In other words, the outcome of the problem solutions must matter to them (Dixon 1998). Participants within the small group (set) may all work on the same problem or different problems (Froiland 1994). In addition, the problem(s) may either deal with strategic issues (what to do), or tactical issues (how to do it) (Dilworth 1998a). However, the problems should be nontechnical in nature and sanctioned by a "coalition of power" within the sponsoring organization(s) (Dixon 1998).

The Set refers to the four to six action learners who work together to solve the problem(s) ("What Is Action Learning?" 1996). Each set member acts as a consultant, advisor, and devil's advocate for every other set member (Inglis 1994). The set members need not be specialists, but they must be competent and committed to the process. In order to see the problem with "fresh eyes," the sets should be composed of people from diverse disciplines and/or present problems with which they are unfamiliar (Dixon 1998).

The Client is the person who owns the problem. The client may be synonymous with the set member or may be the sponsoring organization(s) (Inglis 1994).

The Set Advisor acts as the group facilitator. The role of the set advisor is most important at the beginning of the process. Later, the set participants may assume the responsibilities of this role. (Dilworth 1998a). The set advisor increases group cohesiveness by explaining the action learning process to the group and, when necessary, building appropriate interpersonal skills. In addition, the set advisor may increase the confidence and commitment of the client through open communication with the client. Once the group has started, the set advisor may assist individuals in gaining a better self-perception and may act as a resource by asking appropriate questions or suggesting appropriate references ("What Is Action Learning?" 1996).

The Process involves observation of the problem, reflection and hypothesis forming, and action. Factual information about the problem is gathered on an ongoing basis. Reflection and hypothesis forming take place before, after, and during set meetings. Action may be immediate or at the completion of all set activities (Mumford 1997).

Typically, set meetings are made up of a collection of individual time slots of approximately 30 minutes apiece. Each individual discusses the progress they have made on their own project since the last set meeting. Then, fellow set participants ask open-ended questions. This questioning leads to new insights about the nature of the problem. Each participant ends the discussion of their individual problem with an oral (and written) action plan to be accomplished by the next set meeting. The meeting ends with a brief reflection on set accomplishments and recommendations for process improvement. Usually, set rules include speaking one at a time and maintaining absolute confidentiality. Periodically, it may be necessary to schedule a presentation to the set members by a technical expert on some matter of mutual interest during a scheduled set meeting. Ideally, all meetings should take place in private, quiet, and relatively comfortable surroundings (McGill and Beaty 1995).

What Are the Advantages of Action Learning?

Through AL, set participants are able to solve long-standing problems that could not be solved by simple training, while developing their leadership abilities (Lanahan and Maldonado 1998). The process empowers participants by encouraging them to take charge of their own problems (Mumford 1991). Action learning also accommodates a wealth of objectives and flexibility of design ("What Is Action Learning?" 1996). In addition, transfer of learning may be increased with AL since participants are able to take immediate action (Yorks et al. 1998).

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What Are the Challenges to Action Learning?

There are three types of challenges to the action learning methodology: (1) concerns about its misinterpretation, (2) concerns about the methodology itself, and (3) questions about its effectiveness. As previously mentioned, action learning is frequently confused with "learning by doing," which includes everything from task forces to case studies. Among the concerns about the process itself are questions about the advisability of encouraging set members to work on unfamiliar problems to improve normal job performance (Wallace 1990). Also, Revans' belief that the questioning process could not be taught is in doubt. In fact, there are many ways of stimulating meaningful questioning, all of which can be taught by an "expert" (Smith 1988). Another critisism is that the process involves more than strictly rational problem solving. The political and emotional aspects of the group process must be considered (Vince and Martin 1993).

In addition, action learning, in its pure form, is difficult to implement in cultures with largely didactic approaches to education (Pun 1992). Finally, the question of whether action learning actually increases performance has not yet been adequately answered. Most course evaluations give some indication of participants' personal growth. However, these evaluations rarely attempt to take an unbiased measure of the impact of the course on the participants' performance. In one case in which an unbiased performance measure was attempted, the conclusion was that the process had made a major impact on some individuals, but little impact on the organization. Later, it was suggested that organizational impact may occur over a period of years (Wallace 1990).

Applications of Action Learning

Action learning has many applications in adult education. It may be used any time learners have a salient, nontechnical problem to solve and the capacity to work in small groups. For example, in industry, AL sets have been used to facilitate teamwork among middle management, for personal development, to increase productivity, and to increase effectiveness in a public service department ("What Is Action Learning?" 1996). It has been used in nursing education to encourage clinical nurses to reflect on and learn from clinical experiences (Haddock 1997). Action learning has also been used in university human resource development graduate programs to help students more creatively apply the HRD principles to real-world problems (Willis 1998).

Recommendations for Implementation

Prepare set participants for the action learning process with a start-up workshop to increase their understanding of the nature and purpose of AL and clarify the problem (Inglis 1994).

Have set participants complete a learning style questionnaire prior to the start-up workshop. Evaluate these questionnaires and discuss the impact of learning styles at the start-up workshop. If possible, diversify the learning styles within each set (Wallace 1990).

Discuss and reflect on the impact of set politics on the process at the first meeting (Vince and Martin 1993).

Be sure set advisors have appropriate preparatory training (Wallace 1990).

Document personal development and encourage reflection by asking participants to record any new thoughts concerning their problem or the AL process in a learning log between set meetings (Inglis 1994).

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Developed with funding from the Office of Educational Research and Improvement, National Library of Education, U.S. Department of Education, under Contract No. RR93002001. Opinions expressed do not necessarily reflect the position or policies of OERI or the Department.

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